Client Intake Questionnaire
Pension & IRA Information

A. <u>Pensions & Annuities.</u> (*Complete this section if either you or your spouse is receiving a pension other than Social Security)*   <u>Taxpayer</u>   <u>Spouse</u>

- Age?…………………………………………………..   _____   _____
- What was the starting date of your pension?……………   _____   _____
- How old were you when you first began receiving pension payments?…………………………………………   _____   _____
- Did you contribute to the cost of your pension before you retired? (that is, was part of the total contributions to your retirement plan paid by you with after-tax earnings?)…..   Yes   No   Yes   No
- Was part or all of what you received this year a partial or total lump distribution from a qualified retirement plan?… Yes   No   Yes   No

B. <u>Minimum Distributions</u>. (*Complete this section if either you or your spouse is over age 70 ½*)
- Are you entitled to any distributions from a qualified employee retirement plan that you have NOT yet begun to receive?………………………..……………………   Yes   No   Yes   No
- Do you have an IRA from which you have NOT yet begun to take any distributions?………………….……..   Yes   No   Yes   No

C. <u>IRAs.</u> *(Complete this section if either you or your spouse contributed to (or plan to contribute to) an IRA, or received any distributions from an IRA this year?<u>)</u>*

- Age?…………………….…………………………   _____   _____
- How much have you or do you plan on contributing for the current year? (Include amounts for the period January 1, 2003 thru April 15, 2003)……………………   _____   _____
- Will this be a contribution to a Roth or to a Traditional IRA?……………………………………………..   Roth   Trad   Roth   Trad
- How much have you received from your IRA from January 1, 2002 thru December 31, 2002?………………   _____   _____
- Was this a distribution from a Roth or from a Traditional IRA?……………..…………………….   Roth   Trad   Roth   Trad

D. <u>Saver's Credit</u> (*Complete this section if either you or your spouse contributed to ANY type of tax deferred retirement plan including IRAs or employer-sponsored plans such as a 401k this year AND your income was less than $50,000 MFJ, $37,500 HH or $25,000 S.)*

- Have you received any <u>distributions</u> from IRAs or qualified retirements plans for the following periods: From January 1, 2003 thru April 15, 2003. If so, how much?……………………………………………..…..   _____   _____
From January 1, 2000 thru December 31, 2002. If so, how much?……………….…………………………….   _____   _____